Reference Guide

Plan Library – Portfolio Management – Product Management (Individual & Family Plans)

Summary

The Plan Library lets you perform various functions from the Portfolio Management. You can access Product Management, where you can add new and clone products and manage and add new benefit categories.

What You'll Learn

In this article, you'll learn how to:

- Search in Product Management
- Add a New Product
- Edit a Benefit Category
- Clone a Product
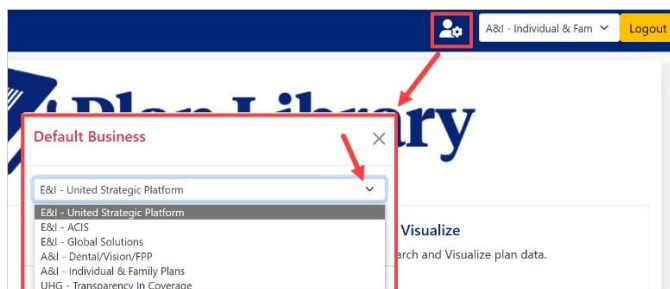
Searching in Product Management

You'll search in Product Management for a listing of all available benefits.

Complete the steps below to search for a benefit category.

1. Launch the *Plan Library* home page.
2. Click the **Business** drop-down list and choose **A&I - Individual & Family Plans**.

Note: You can set a default business. Select the **Default Settings** icon at the top of the menu. The *Default Business* pop-up window opens. Click the drop-down list and choose your default business and click **Set Default**.

3. Under the *Ideate* section, select **Portfolio Management**.
4. Select **Product Management.**
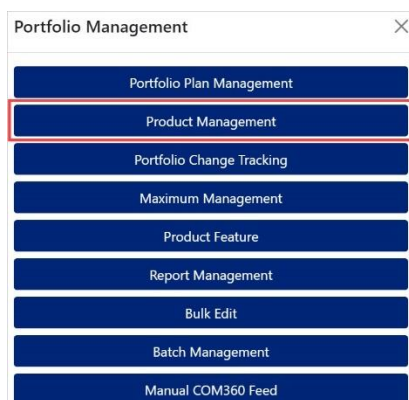
The *Product Management* screen displays.

5. You can narrow your search criteria by selecting the following drop-down list options:

   A. COC Series
   B. Organization
   C. State
   D. Product (default Individual Exchange)
   E. Product Family

6. Click **Search**.

Field	Description
COC Series	Certificate of Coverage - The portfolio series associated with the plans loaded each year.
Organization	The Organization default is Individual Exchange.
State	The customer's State where the plan can be sold.
Product	Identifies if a plan offers INN or INN/ONN benefits and if a PCP is required, i.e., Individual Exchange, Choice, Choice Plus.
Product Family	

Use the **Clear** button to clear all fields and start a new search.

> **Note**: Use the **blue arrow** ⊘ at the bottom left side of each screen to return to Portfolio Management screens or for quick access to other sections in the Plan Library, such as Transformation Engine, etc.
>
> Use the drop-down arrow to expand each section. The **X** at the top closes the menu.
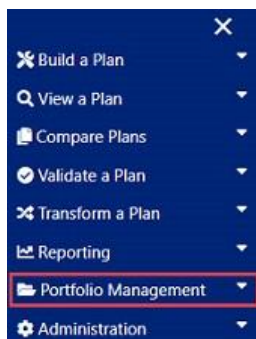
Add a New Product

The Add New lets you add a new product if your search result is not found. You can add a new product from the *Product Management* screen.

To add a new product:

1. From the *Product Management* screen, complete the required fields:
   a. COC Series
   b. Organization
   c. State
   d. Product
   e. Product Family

2. Click **Add New**.

The "*Product added successfully.*" message appears.

Note: If you leave one or more of the fields blank, you'll receive an "*Error Please select all filters to add new product.*" message. If the benefit category exists, you'll receive an error "Product is already exist."

★ **Product Management**

COC Series	Organization	State	Product	Product Family
2023	IEX-Individual Exchange	RI	Individual Exchange	Advantage+ (Co-Pay)

Clear   Add New   🔍 Search

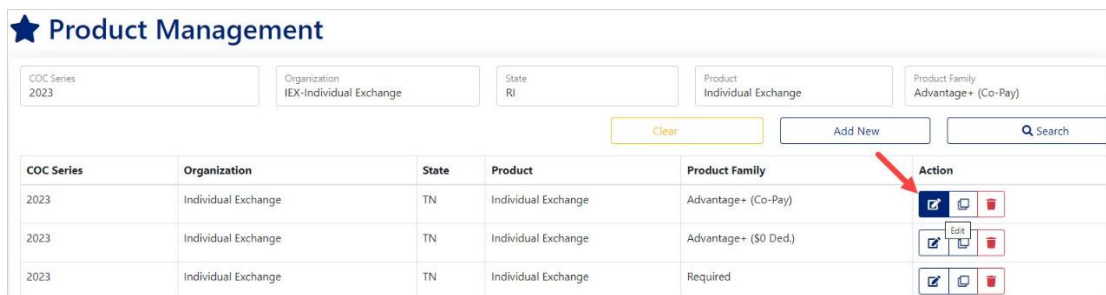| COC Series	Organization	State	Product	Product Family	Action
2023	Individual Exchange	TN	Individual Exchange	Advantage+ (Co-Pay)	🖉 🗐 🗑
2023	Individual Exchange	TN	Individual Exchange	Advantage+ ($0 Ded.)	🖉 🗐 🗑
2023	Individual Exchange	TN	Individual Exchange	Required	🖉 🗐 🗑

To view the product you added, enter the search fields, and click Search. The new *Product* displays in the list.

To deactivate a product, click the **Deactivate** 🗑 icon next to the desired product. To Activate a product, click the **Activate** ⊕ icon.

Edit a Benefit Category

Complete the steps below to edit a benefit category.

1. From the *Product Management* screen, next to the desired *Product*, click the **Edit** ☑ icon.

The *[Year] [Organization] [State] [Product] [Product Family]* screen displays the Benefit Categories for the selected benefit.

2. If applicable, check or uncheck **Include** and **EHB** checkbox. **Note**: To enable the 'EHB' checkbox, you must check 'Include'.

3. Select the **EHB Variance Reason** dropdown menu and choose an option.

4. Edit the **Levels** for the applicable benefit categories.

5. If applicable, click the *Parent* dropdown list and choose the **Parent**.

6. Click **Save**.

The "*Benefit categories changes updated successfully*." message appears.

> **Note**: When you edit a *Benefit Category*, you must select at least one row, or you will receive "*Error Please select at least one row to Save*." message.

Field	Description

Include	Check to include the Benefit Category in Portfolio Editor.
EHB	Check when the Benefit Category is EHB eligible.
EHB Variance Reason	Select the EHB Variance Reason when EHB applicable and populates on the PBT report.
Levels	Used to indicate tiering, or split cost share on a plan.
Parent	When selected will configured the Benefit Category selected as a Child to the Parent Value selected in the drop down in the Portfolio Editor.

Add a New Benefit Category

You can add a new benefit category from the *[Year] [Organization] [State] [Product] [Product Family]* screen*.*

1. Click **New Benefit Category**.

The "*Add a New Benefit Category*" pop-up window opens.

2. Enter the name in the **Benefit Category Name**.
3. Click **Save**.

The "*Successfully added Master Benefit Category*" message appears.

If the Benefit Category already exists, you will receive an "*Error – Already Benefit Category Exists in Master Benefit Categories*."

Cloning a Product

Cloning a product starts with extracting information from an existing product and cloning the data to the newly added product.

To clone a Product:

1. Navigate to the *Product Management* screen, next to the desired *Product*, select the **Clone** 🗖 icon.

The *Clone Product Configuration* popup window opens.

2. Complete the applicable fields:

    a. COC Series

    b. Organization

    c. State

    d. Product

    e. Product Family

3. Click **Clone**.

The "*Success Product added successfully.*" message appears.

4. Click **OK**.